Customer Oriented Reports (COR)

Ad Hoc

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Course Topics

Course Topics

Note: Links will ***only*** work in PowerPoint's slide show view.

Module	Ad Hoc Reports
Lesson One	**About Ad Hoc Reports**
Topic One	About Ad Hoc Reports
Topic Two	Running an Ad Hoc Report

Course Objectives

At the end of this training you should be able to:

- Navigate the ad hoc reports
- Access the components of an ad hoc report
- Run an ad hoc report
- Use the toolbar options to perform report functions

Course Modules

Course Modules

Module	Ad Hoc Reports

Module – Ad Hoc Reports

Module

Ad Hoc Reports

Module – Topics

Module Topics

Topic One	About Ad Hoc Reports
Topic Two	Running an Ad Hoc Report

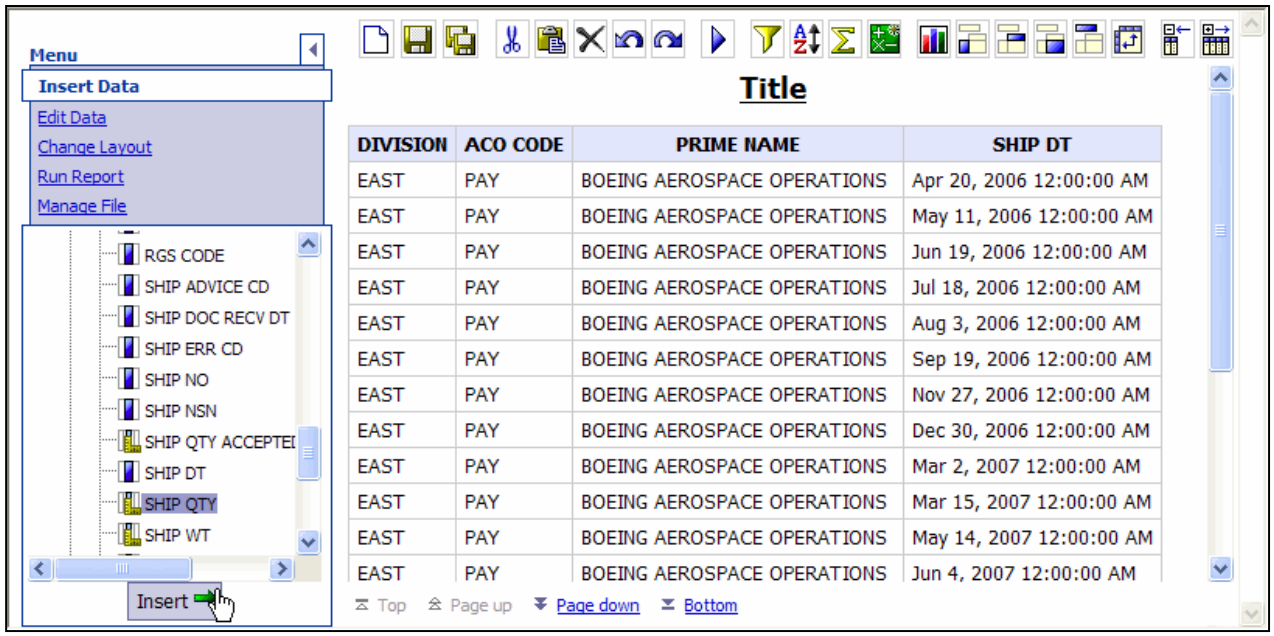
Topic One – About Ad Hoc Reports

About Ad Hoc Reports

Ad hoc means “to this,” in the sense of “For one specific purpose.”

An ad hoc report provides you with great flexibility to:

- Select types of data to be shown
- Filter the data to be shown
- Manipulate the display of query results in the report view
- Select the web location to publish and save data


Menu
Insert Data
Edit Data
Change Layout
Run Report
Manage File
RGS CODE
SHIP ADVICE CD
SHIP DOC RECV DT
SHIP ERR CD
SHIP NO
SHIP NSN
SHIP QTY ACCEPTEI
SHIP DT
SHIP QTY
SHIP WT
Insert
Title
DIVISION | ACO CODE | PRIME NAME | SHIP DT
EAST | PAY | BOEING AEROSPACE OPERATIONS | Apr 20, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | May 11, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Jun 19, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Jul 18, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Aug 3, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Sep 19, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Nov 27, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Dec 30, 2006 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Mar 2, 2007 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Mar 15, 2007 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | May 14, 2007 12:00:00 AM
EAST | PAY | BOEING AEROSPACE OPERATIONS | Jun 4, 2007 12:00:00 AM
Top
Page up
Page down
Bottom

Graphic 1.1.1.1: Ad Hoc Main Menu

Topic One – About Ad Hoc Reports

Viewing the Ad Hoc Report Tool

See the training module for accessing eTools reports.

Applications that have a Reports link will display the reports page when the link is clicked. Some applications offer ad hoc reporting.

How to View the Ad Hoc Report Tool on the Reports page (See Graphics 1.1.1.2 and 1.1.1.3)	
1.	*Click* the **Ad hoc** menu on the Reports List page (Graphic 1.1.1.2). • The **Ad hoc Saved Query List** displays (Graphic 1.1.1.3)
2.	Do one of the following: *Click* **Launch Query Studio** to create an ad hoc query. **OR** *Select* a saved ad hoc query from those listed on the **My Folders** or **Public Folders** tabs.

Graphic 1.1.1.2: Reports Main Menu

eTools
Welcome 0206 DCMA
Reports
Cubes
Ad hoc
Launch Query Studio
Ad hoc Saved Query List
This page displays a list of ad hoc queries related to the b
You can click on the query name to launch Query Studio t
"Launch Query Studio" link to start a new query.
My Folders
Public Folders
Query Name
ACO Listing
Contracts Past FDD

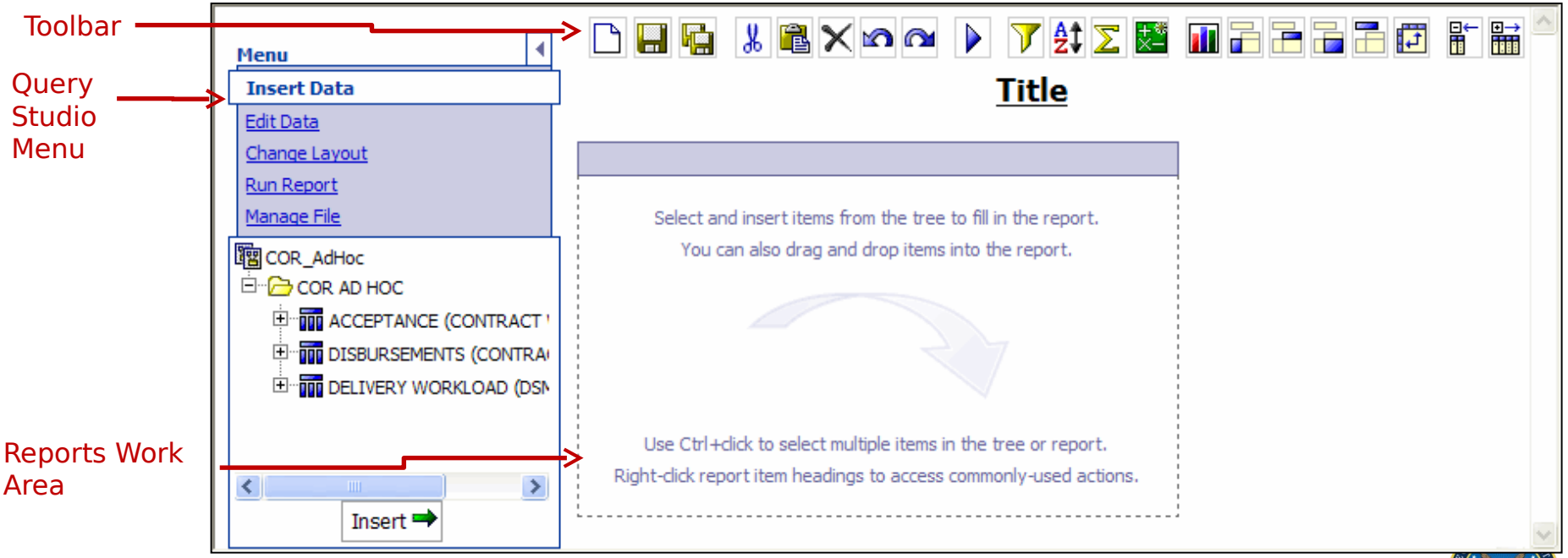
Graphic 1.1.1.3: Ad hoc Main Menu

Topic One – About Ad Hoc Reports

Ad Hoc Components

The ad hoc reporting tool offers components to help you select, filter, view, and manipulate your data. The **toolbar** provides options for saving, cutting and pasting, filtering, sorting, and manipulating the data displayed in the **report work area**.
The **Query Studio Menu** shows the three ad hoc data options for the **report work area**:

- Acceptance (Contract Workload)
- Disbursements (Contract Workload)
- Delivery Workload (DSM). DSM stands for Delivery Schedule Manager.



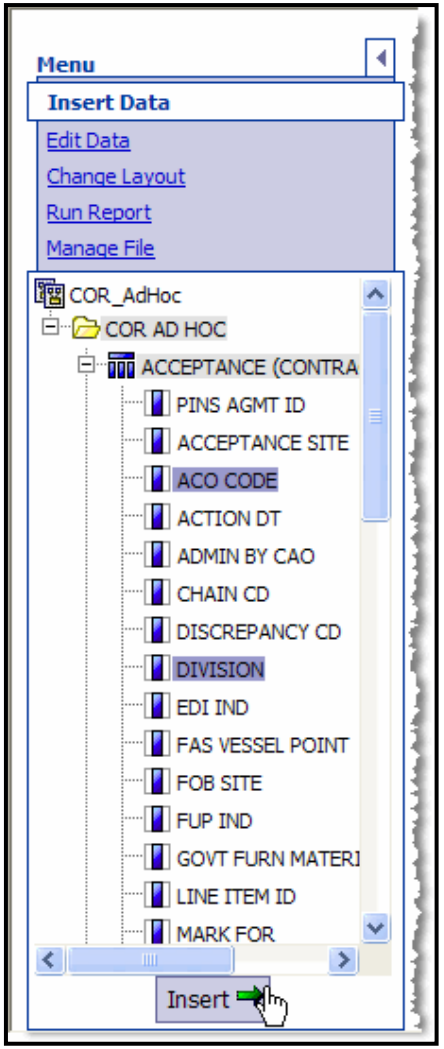
Graphic 1.1.1.4 Ad hoc Components

Topic One – About Ad Hoc Reports

Query Studio Menu

The Query Studio Menu allows you to insert and edit the data shown in the report. It also lets you change the layout, run the report, and manage files.

Query Studio Menu (See Graphic 1.1.1.5)	
1.	*Click* the **Menu** hyperlinks. • This will change the options in the window located below
2.	*Selecting* **Insert Data** lists the available data. • When this option is selected, you can *click* the data then *click* the **Insert** button to show it in the report work area of the page



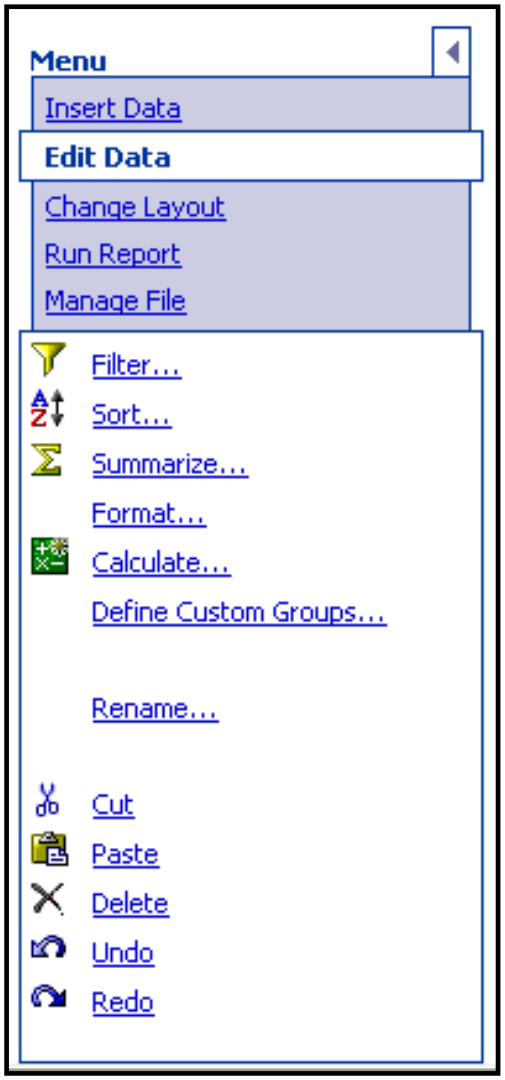
Graphic 1.1.1.5: Query Studio Menu

Topic One – About Ad Hoc Reports

Query Studio Menu

Graphic 1.1.1.6 depicts the different components on an Ad hoc report. You have the option of editing data, changing the layout, and managing a file.

These options also appear on the Ad hoc toolbar.



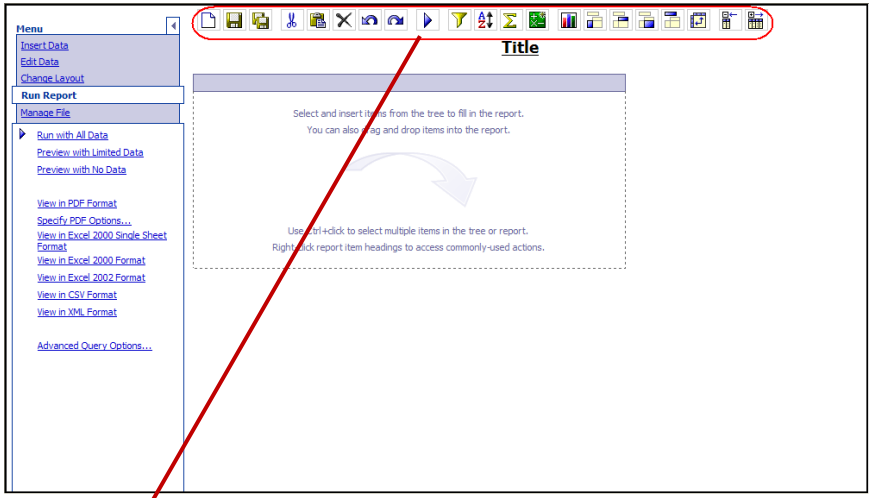
Graphic 1.1.1.6: Query Studio Main Menu

Topic One – About Ad Hoc Reports

Using the Toolbar

Graphic 1.1.1.7 shows the toolbar. The icons on the toolbar perform the following functions:

	Save, Save As: save the query to My Folders or to Public Folders
	Cut, Paste: Cut and paste data anywhere on the report.
	Undo, Redo: Undo and redo last changes.
	Run query and re-prompt: Run the report or re-prompt the report.
	Filter, Sort: Scope the data and sort it in ascending or descending order.
	Summarize, Calculate: Run calculations and summarize data.


Menu
Insert Data
Edit Data
Change Layout
Run Report
Manage File
Run with All Data
Preview with Limited Data
Preview with No Data
View in PDF Format
Specify PDF Options...
View in Excel 2000 Single Sheet Format
View in Excel 2000 Format
View in Excel 2002 Format
View in CSV Format
View in XML Format
Advanced Query Options...
Title
Select and insert items from the tree to fill in the report.
You can also drag and drop items into the report.
Use Ctrl+click to select multiple items in the tree or report.
Right-click report item headings to access commonly-used actions.

Graphic 1.1.1.7: Ad hoc Toolbar

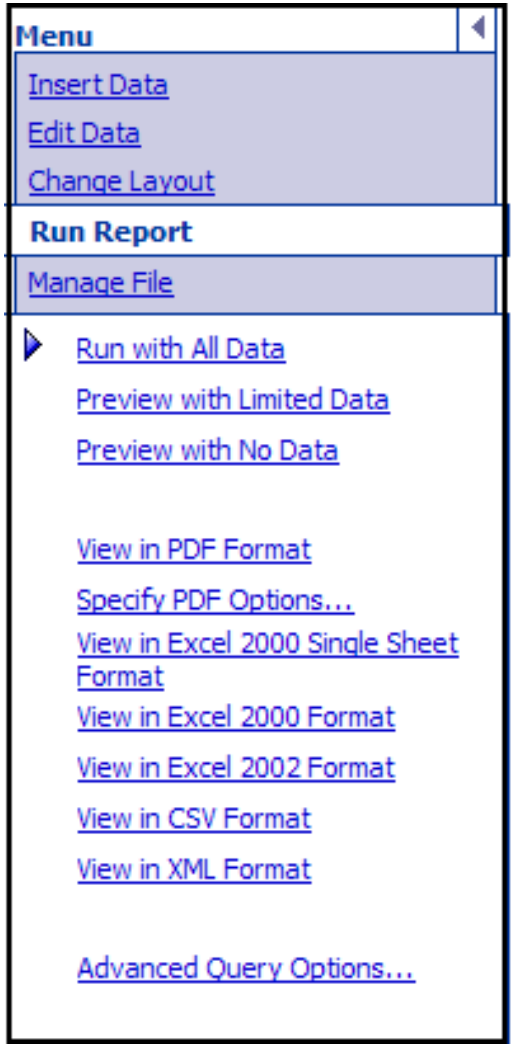
Topic Two - Running an Ad Hoc Report

Running an Ad Hoc Report

The **Run Report** link will give you data view options, allowing you to build a report with limited data on, all the data on, or all the data off.

The second set of links allow you to export the report data to PDF, Excel, comma-separated values (CSV), or XML.

Running an Ad Hoc Report (See Graphic 1.1.2.1)	
1.	*Click* **Run Report**.
2.	*Select* **Preview with No Data**. • A best practice is to select **Preview with No Data** to set the structure, then pull only the data that you need • This reduces the number of times you wait for your query to run



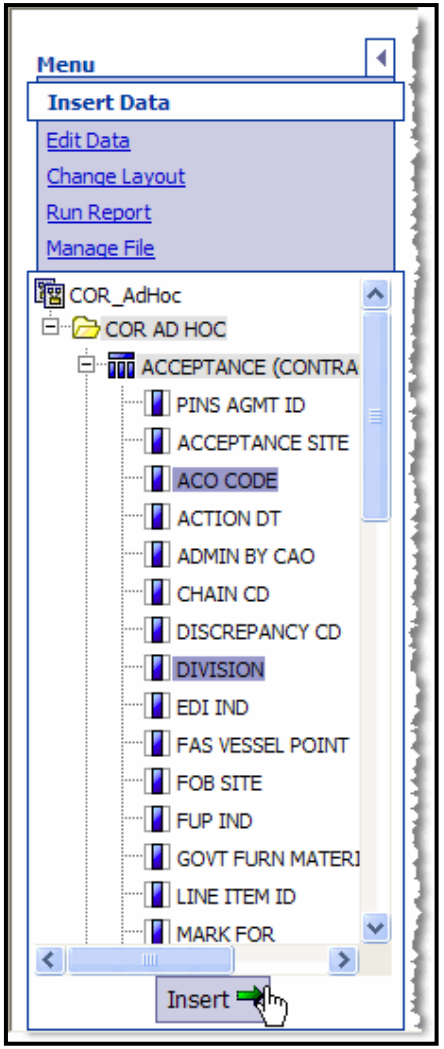
Graphic 1.1.2.1: Ad Hoc Menu

Topic Two - Running an Ad Hoc Report

Selecting Data for an Ad Hoc Report

Ad hoc reports allow the user to customize a data query by selecting specific fields to define the search criteria.

Selecting Data for an Ad Hoc Report (Graphic 1.1.2.2)	
1.	*Select* "+" or "-" to expand or collapse the data folders, which contain numerous data tables. • Data table is represented by • Data table can be expanded to reveal data items, with are shown as
2.	Do one of the following: *Select* the data item for the report. *Press* the **CTRL key** to select more than one data item. *Click* the **Insert** button. **OR** *Click* the **data item** and *drag* it to the report area.



Graphic 1.1.2.2: Selecting Data for an Ad Hoc Report

Module Review

Module Covered the Following Topics:

Topic One	About Ad Hoc Reports
Topic Two	Running an Ad Hoc Report

Course Objectives

Now that you have completed this training, you should be able to:

- Navigate the ad hoc reports
- Access the components of an ad hoc report
- Run an ad hoc report
- Use the toolbar options to perform report functions
- Navigate the ad hoc reports